Central Puget Sound
Regional Fare Coordination System

Agency Website – Student Workbook

Document No: SEA-02704 **Category: Phase 2** **Revision: 6.0**
Publisher: ERG Transit Systems **Revision Date: Nov 07, 2008**

ERG Approvals	Author	Process Manager	Manager
Name:	Tricia Spicer Bekey	Alain Baillard	Rose Fallaw
Signature:			
Date:			

This material is delivered to the Contract Administrator under Contract No. 229944, a Contract for the Development, Operation and Maintenance of the Central Puget Sound Regional Fare Coordination System. The material is copyright protected and, except as provided in that Contract, may not be reproduced, stored in a retrieval system or transmitted in any form or by any means in whole or in part without the express written consent of ERG.

Confidential

Contents

1 Introduction **3**
2 Practice Exercises **5**
3 Student Assessment Exercise **7**
4 Module Evaluation Form **9**
5 Notes **11**
Appendix A References **13**
Appendix B Document History **14**

ERG Confidential © ERG 2008
To be disclosed only to Agency personnel who have a need to know

1 Introduction

This Student Workbook is to supplement the RFCS Agency Website Operations Training course.

This Student Workbook is assembled to provide each student with a consolidated package of material to use during the training session.

ERG Confidential © ERG 2008
To be disclosed only to Agency personnel who have a need to know

ERG Confidential © ERG 2008
To be disclosed only to Agency personnel who have a need to know

2 Practice Exercises

Practice what you are learning by performing the following tasks on the Agency website.
~~:~~Each task indicates whether it should be performed in Training Mode, Production or OJT (on the job training) venue.

1) **Practice Exercises 1:**
   a. Log in to the Agency Website (Training Mode)
   b. Change user password to one provided by instructor (Training Mode)
   c. Log out of the Agency Website (Training Mode)

2) **Practice Exercises 2:**
   a. Order new fare cardstock (Training Mode)
   b. Order Operator cards (Training Mode)
   c. Order New Preloaded Disposable Cardstock (Training Mode)~~cards~~
   d. Modify a card order placed in prior exercise (Training Mode)
   e. Cancel a card order placed in prior exercise (Training Mode)
   f. Accept a shipped card order (Training Mode)
   g. View card inventory for both a single card and a range of cards (Production)
   ~~g. Update card inventory by changing the status of a card to Damaged~~

Comment [jb1]: COM-v3.0-006
Comment [jb2]: COM-v3.0-006
Comment [jb3]: COM-v3.0-005

3) **Practice Exercises 3:**
   a. Update card inventory by changing card status to Damaged (Supervisors Only) (OJT)
   b. View the details of an existing work order (Training Mode)
   c. View an example transaction history (Production)
   d. Block specific products on a single ORCA card (Supervisors Only) (Training Mode)
   e. Block a range of ORCA cards (Supervisors Only) (Training Mode)
   f. Update the ACCESS eligibility file (Authorized KCM users Only) (Training Mode)

4) **Practice Exercises 4:**
   a. View the NSF events for a customer (Authorized users Only) (Production)
   b. Add a new NSF event for a customer (Supervisors Only) (Training Mode)
   c. Update history information in an NSF event record (Supervisors Only) (OJT)
   d. Add a bad check entry (Supervisors Only) (Training Mode)
   e. Delete a bad check entry from previous exercise (Supervisors Only) (Training Mode)
   f. Update a corporate check/PO entry (Supervisors Only) (OJT)

5) **Practice Exercises 5:**
   a. Add a new vanpool ID (Authorized users Only) (Training Mode)
   b. View and update an existing vanpool ID (Authorized users Only) (OJT)

ERG Confidential © ERG 2008
To be disclosed only to Agency personnel who have a need to know

6) **Practice Exercises 6:**
   a. Upload a rebate file (Authorized WSF users Only) (Training Mode)
   b. Authorize a rebate (WSF Supervisors Only) (OJT)

7) **Practice Exercises 7:**
   a. Search the Knowledge Base (Production)
   b. Add and remove a Knowledge Base item (Authorized user Only) (OJT)

ERG Confidential © ERG 2008
To be disclosed only to Agency personnel who have a need to know

3 Student Assessment Exercise

Demonstrate what you have learned by performing the following tasks on the Agency website:

1) Change your user password
2) Place a new card order
3) Search for a work order and view the details
4) Find an order that has been shipped and accept it
5) View a customer's NSF history (Authorized users Only)
6) View the transaction history on a card
7) View and update an existing vanpool ID (Authorized users of applicable Agencies only)
8) View a rebate history (Authorized WSF users Only)
9) Search the Knowledge Base

Comment [jb4]: COM-v3.0-007

Comment [jb5]: COM-v3.0-008

ERG Confidential © ERG 2008
To be disclosed only to Agency personnel who have a need to know

ERG Confidential © ERG 2008
To be disclosed only to Agency personnel who have a need to know

4 Module Evaluation Form

MODULE TITLE: _____

DATE: _____ **INSTRUCTOR:** _____

Please indicate how well you think the module met the listed objectives by checking the corresponding box, where 3 = objective fully met, 2 = objective mostly met, 1 = objective partially met, 0 = objective not met.

Objective	3 Fully Met	2 Mostly Met	1 Partially Met	0 Not Met
Demonstrate the ability to navigate the Agency website				
Demonstrate how to carry out various customer support service functions				
Demonstrate how to carry out card inventory functions				
Demonstrate how to carry out Supervisor functions				
Describe procedures for updating the Knowledge Base				

In your own words, how would you rate this module overall in preparing you to work with the Agency website?

What would you change to make this module more effective?

Thank you for your cooperation

ERG Confidential © ERG 2008
To be disclosed only to Agency personnel who have a need to know

ERG Confidential © ERG 2008
To be disclosed only to Agency personnel who have a need to know

5 Notes

Notes:

ERG Confidential © ERG 2008
To be disclosed only to Agency personnel who have a need to know

Notes:

ERG Confidential © ERG 2008
To be disclosed only to Agency personnel who have a need to know

Appendix A References

The following materials are to be used in conjunction with or are referenced by this document.

[1] SEA-00365 Agency Website Operations Manual

[2] SEA-02704 Agency Website – Student Workbook

ERG Confidential © ERG 2008
To be disclosed only to Agency personnel who have a need to know

Appendix B Document History

Revision	Revision Date	Reason for Issue	Author
0.1	31 July 2006	Initial Draft	Yvonne Ricker
1.0	31 July 2006	Release to Customer	Patrick Branch
1.1	28 Aug 2006	Insert revised presentation for pdf	Stephen Lynch
1.2	1 Dec 2006	Content Revision	Patrick McDonald
1.3	18 Dec 2006	Edit/format	Stephen Lynch
1.4	13 June 2008	Updated for submission	Tricia Spicer Bekey
1.5	23 June 2008	Format revision	Kayla Joy Sherwood
1.6	25 June 2008	Updated for submission	Tricia Spicer Bekey
1.7	27 June 2008	Review for submission	Kayla Joy Sherwood
1.8	30 June 2008	Edit for submittal Phase 2 Release 2 Training materials [SEA300670]	Leigh Alexander
2.0	30 June 2008	Release to Customer – Phase 2 Release 2 Training materials [SEA300670]	Rose Fallaw
2.1	21 July 2008	Format change per customer request.	Kayla Joy Sherwood
2.2	21 July 2008	Format change per customer request – update table of contents	Kayla Joy Sherwood
2.3	14 Aug 2008	Review for submission	Michael Grey
2.4	15 Aug 2008	Edit for submittal	Daniel Salter
2.5	18 Aug 2008	review document against comments and responses	Leigh Alexander
3.0	18 Aug 2008	Release to Customer	Rose Fallaw
3.1	3 Oct 2008	Responses to Dry-Run training session comments	Michael Grey
3.2	3 Oct 2008	Edit for submittal [SEA300730 – ERG revises & resubmits]	Leigh Alexander
4.0	3 Oct 2008	Release to Customer	Rose Fallaw
4.1	21 Oct 2008	Edited for Submittal	Michael Grey
5.0	23 Oct 2008	Release to Customer - Release 2 Trng - ERG ReSubmits	Rose Fallaw
5.1	05 Nov 2008	Updates made to practice exercises following Agency feedback	Joan Bayer
6.0	07 Nov 2008	Release to Customer	Rose Fallaw

ERG Confidential © ERG 2008
To be disclosed only to Agency personnel who have a need to know